

## Case 6: Personal Imperative Linked to Diversity, Equity & Inclusion

Ajay is a senior accountant at Conway Lipstein, a mid-sized accounting firm. Ajay also happens to be gay, though doesn't feel it's necessary to disclose his sexual orientation to his fellow employees unless it comes up organically in conversation. In previous workplaces, some people were uncomfortable with his sexual orientation; they saw his sexual orientation as his entire identity and treated him differently.

Ajay has worked at Conway Lipstein for four years and has always felt welcomed. He enjoys working with his team and has made close friends with many of the other staff. In a conversation outside work, he was speaking with a colleague, Colin, who recently joined Conway Lipstein. Ajay and Colin know each other well; they went to university together, and Ajay actually referred Colin to the firm. Colin recently came out as gay, so he and Ajay often discuss their experience of being gay in the workplace.

Colin mentions that he doesn't feel the need to hide his sexual orientation at work, but he also doesn't feel as though it's his responsibility to disclose his identity to everyone he meets. Ajay agrees. They talk about how they are constantly trying to strike a balance between maintaining privacy and being their authentic selves. After their conversation, Ajay wonders whether other accountants at Conway Lipstein are struggling with similar issues.

Ajay is lucky to have Colin, but he's worried some of his other colleagues who are experiencing a similar challenge may not be as lucky. He wants to start an employee resource group (ERG) for 2SLGBTQI+ employees at the firm. A 2SLGBTQI+ ERG would provide a sense of community and build awareness for others around 2SLGBTQI+ challenges in the workplace and in society. He knows there's an ERG for women at the firm that provides a sense of community to the women employees and offers programs to help them thrive at the firm. Ajay thinks that initiating a 2SLGBTQI+ ERG could be very rewarding.

Ajay meets with his manager to discuss starting this ERG. She is more than supportive and thinks this is a great initiative. She arranges for Ajay to meet with the Chief Financial Officer (CFO) at the end of the week. Ajay is excited to meet with the CFO, but he's also nervous. This is not just a professional presentation; it's also a personal one.

In preparation for the meeting, Ajay creates a slide deck with the following information: the goal of a 2SLGBTQI+ ERG, benefits it may provide, how it ties to Conway Lipstein's organizational values, and a personal testament to his lived experience as a gay man in the accounting industry. It's not a long presentation, but Ajay knows it's enough to give the CFO an idea of what he's hoping to accomplish with this group.

On the day of the presentation, Ajay heads up to the CFO's office. The CFO's name is Nelson, and Ajay has only seen him in company newsletters or in town halls. He's never met him in person. Nelson greets Ajay warmly and tells him that he's excited about their meeting. Ajay gives his

presentation, outlining the benefits of having a 2SLGBTQI+ ERG at Conway Lipstein. Once he's done, Nelson has only one question for him: "How much is this going to cost?"

Ajay is taken aback by Nelson's question. He doesn't assume it will require many resources. "We just need a meeting room so we can meet outside of work hours," Ajay responds. "And, if the group decides on any initiatives, I hope the executive team will take them into consideration."

"What kind of initiatives do you have in mind?" Nelson asks. Ajay thinks for a moment. "It would be great to arrange for a guest speaker to come in during pride month to speak about the 2SLGBTQI+ experience in the workplace, for example."

Nelson says that while that sounds like a great idea, he isn't sure why it needs to be an organizational matter. He asks if the employees who would join this group could just do it on their own personal time. Ajay responds, "Well, one of Conway Lipstein's core values is inclusion. This group would definitely help create a more inclusive workplace environment."

"That's true," Nelson says, "but the employee resource group for women has already taken a lot of resources to change policies, bring in guest speakers, supply training, and all that nonsense. I just don't think it's in the budget right now to create another group of that calibre."

Disappointed, Ajay thanks Nelson for his time and leaves his office. After Ajay leaves, Nelson thinks about their conversation. He isn't sure how many employees would even join the group. How many gay employees does Conway Lipstein have? He doesn't think it's necessary to dedicate all that time and resources to another ERG. The ERG for women has already done wonders for the firm—it enforces the firm's dedication to inclusion, creates change in its foundational work, and lots of women have come forward to express their appreciation for the group. Does the firm really need a second group just for its 2SLGBTQI+ employees?

Questions:

- (1) Why was Ajay so dedicated to creating an ERG for 2SLGBTQI+ employees? Is this group necessary in the workplace, or should it be personal and outside the firm's mandate? How could an ERG like this change Ajay's and Colin's experience at work?
- (2) Was Nelson's response to Ajay's request appropriate? Why did Nelson respond solely from a resourcing perspective? Is employing different perspectives a part of his responsibilities as CFO?
- (3) What are some characteristics Nelson would need to support a group or initiatives like this? Does he hold inclusion as one of his personal values? Does it make sense for a CFO to have a strong personal connection to organizational values?
- (4) What are the benefits of an ERG like this? With the great outcomes of the ERG for women, would another group for 2SLGBTQI+ employees have the same potential? Or is it unnecessary?

(5) When Ajay leaves Nelson's office, Nelson thinks about how the ERG for women has done wonders for Conway Lipstein. Nelson is clearly aware of the positive impact other ERGs have had. Knowing this, why do you think Nelson's dedication to inclusion stops there?

Additional Resources for Case 6:

- Avoid Virtue Signaling; Embrace Culture-Changing DEI Initiatives (article by Gallup), [here](#)
- Finding The Why In Diversity And Inclusion (article by Forbes), [here](#)
- How to Navigate Pushback to Diversity, Equity and Inclusion Efforts (article by Gartner), [here](#)

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